

ProjectWise Information

Appendix B

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SAJ ProjectWise Information

1.0 Information required to create a project.

1.1 To create a project in the Jacksonville ProjectWise system an e-mail should be sent to **Mr. Roger W. Porzig** with Name of project, P2 ID number, and team members who will be working on the project.

2.0 Adding design files to a project.

2.1 *Drag and drop or create new.* With ProjectWise Explorer open along with the Windows Explorer you can select files, then drag and drop them into your project directory or sub-folders. To create a new document in ProjectWise use a right click in the folder of choice, chose New Document and you will get a dialog that will create a new PW document. Remember that you also have to Import the file under the Advanced tab in the File area of the dialog. This only works with single files where the drag and drop works for multiple files. The down side of drag and drop is that you must go back and add attributes after the fact. With drag and drop the File Name, Name and Description of the document all end up being the same. This is not very useful to others on the team working in your project.

2.2 *Why use attributes?* Attributes are those items that will allow others, and yourself, to locate files at a later date. They also provide a way to let those you are working with know something the file. This may be something like the kind of work the drawing depicts or just the plate number of the Sheet model.

2.3 *How to enter attributes.* You enter attributes using the properties menu of the document. Select a document in the ProjectWise explorer and press the spacebar as this will bring up the needed dialog. The general tab has areas you can edit in white. The system will only be as useful as we make it by using meaningful descriptions for the data we store.

3.0 Scanning reference files. ProjectWise alone does not know anything about the reference files that go with the drawing you just dropped into your project. It takes the process of running the Scan References Wizard to connect your reference files with your drawing. Take the time to read each page of the wizard and you will find process very efficient at not only connecting which reference files go with your drawing but also that you may have missing files in the drawing set you received from another source. Please see the ProjectWise help for details on running the wizard.

4.0 Checking out a file. There are two basic ways to check out a file to make modifications. The first is to double click the file while in the ProjectWise Explorer. If

you have permission to work on the file this will open MicroStation in edit mode. The other way is to start MicroStation and log into ProjectWise before choosing the drawing to edit.

5.0 Adding a reference to an existing PW drawing. In order to add a reference file to your drawing you first must be in the ProjectWise environment in MicroStation. By that I mean you should log into ProjectWise when starting MicroStation or double click a drawing in the ProjectWise Explorer to start a checkout of a drawing. Then, using the MicroStation reference tools you can attach any file, anywhere in ProjectWise, to your active drawing. Once attached and checked back into the ProjectWise server the reference will always be found when opening the drawing from ProjectWise.

5.1 *There should be only one project border file.* Usually the project border will reside in the general folder of a project. By using the one project border issues like a slight project name or contact number change can be made once, rather quickly, even for projects with hundreds of files.

5.2 *Survey data – don't copy it, reference it!* Our survey data is not survey data if you change it. By copying survey data to your project you run the risk of missing Survey Section updates to the data and you also cause additional disk space to be used (and backup time) adding to our overall cost of doing business. Just reference in the survey data and fewer problems will arise.

5.3 *When a reference files moves.* Sometime it is necessary to rearrange the PW data holding. When this happens files that you have referenced using ProjectWise are tracked and the next time you open your design all of the references will still be attached. The ability of ProjectWise to manage references makes it easy to structure your project without having to have multiple copies of files. This will in turn keep the chance of someone editing the “wrong” file low.

6.0 Checking in a file. There are two ways to check in a file you have checked out from ProjectWise. One way is using the ProjectWise explorer and the other way is using MicroStation in the ProjectWise environment. Using PW Explorer you can either right click on a drawing you have checked out and chose “Check In”, or you can open the PW Organizer from the Tools menu, highlight your checked out files and check them in using the Action menu or the toolbar icon.

7.0 Copying out a file. There are two general uses of the copy out command in ProjectWise. The first is to just copy out the file for viewing or printing while the other method would be used in case you needed modify the file for use in another project.

7.1 *Just to view or print:* In this case you would use the “Open as Read-Only” command from a right-click on the file. This would start MicroStation and allow you to view and or print the drawing.. Because this is read only copy, you will not be allowed to check the file back into PW. You can also use the Copy Out command on the right click menu. This would provide you with a read only copy of the file, along with all the attached

reference files on your local drive. You can see a list of all files you have copied out and the location of the files by using the PW Organizer (from the Tools menu)

7.2 To modify and re-use: If you need to pull data from PW so you change it and then add it as new data into a different project you would be best served using the Document Export or Folder Export Wizards. Don't just click Next when the wizard opens but READ the opening page. This will let you know you use the wizard to COPY out the documents. They can also be exported so that some other organization can get control of the files for editing. The hope here is that you would then import them when the work by the other organization is finished. Pay attention to the second page of the wizard, as it is here you chose the "Send to Folder" option to copy out the file(s). Be aware that the default action is to Export the files, not copy them to a folder.

8.0 Freeing a checked out file. There are times when you have checked-out a file and you do not want to check it back into PW. Maybe you made some mistake with the data or your system crashed. The file then is locked for others and not available for modification Or, maybe you just want to discard your changes and start again. In any case a file you have checked out can be freed using the "Free" command on the right click. This will put the file back to the state just before you checked it out. You can free any document you have permission to modify.

9.0 Moving files among projects. There may be times when one or more files need to move from one project to another. This can be accomplished by using a right click-drag on one or more files. When you have reached the destination folder and release the right mouse button a menu pops up with a Copy Here or Move Here choice. There is also a Cancel action if you realize this is not the action you want to perform. By using the Move Here choice, the file(s) you have selected will be moved to the target folder. All reference file linkages in the files moved will be maintained. The reference files will not move to the target folder.